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ABSTRACT

To determine if further library-services issues require more study and whether further initiatives should be undertaken, the Division for Library Services of the Wisconsin Department of Public Instruction conducted a focus-group study. Nineteen library directors from small public libraries took part. Eight services librarians or directors from medium-sized libraries and 39 reference, interlibrary loan, or academic librarians from larger system resource, academic, and state-level libraries also participated. In general, participants indicated that the need for reference services for adult students is growing. Some areas were identified in which it was difficult to fill requests locally, and participants acknowledged that they lacked the time required to respond to requests and problems in a timely manner. Participants welcomed the focus-group opportunity and the chance to explore problem issues. One table summarizes participant characteristics. (SLD)

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REFERENCE SERVICES

in Wisconsin Libraries

FOCUS GROUP SUMMARY

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Wisconsin Department of Public Instruction

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Reference Services in Wisconsin Libraries: Focus Group Summary

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Background and Purpose for the Research

The Division for Library Services (DLS) of the Wisconsin Department of Public Instruction has conducted a number of studies of interlibrary loan services over the years. In 1976 and 1985, the division published the results of major surveys of interlibrary loan practices and patterns among all types of libraries carried out by Sally Drew, director of the DLS Bureau for Interlibrary Loan and Resource Sharing.

In 1988, the division commissioned yet another study, hiring the firm King Research to document and evaluate the structure of the interlibrary loan and reference referral system in Wisconsin. Other study goals were to determine costs of interlibrary loan services and to assess customer satisfaction with timeliness, quality, and quantity of service.

King Study Summary

The King study was the first division survey in 20 years to include an evaluation of reference services. King researchers estimated that Wisconsin libraries of all types made 297,700 reference requests in 1987. Nearly half of these came from public libraries, less than one percent from school libraries. Almost 60 percent were subject requests, 20 percent involved brief look-ups of information, 9 percent involved difficult verifications, 5 percent called for in-depth reference work, and 5 percent required online bibliographic searches.

The study also found that libraries of each type tended to send/refer reference requests they could not fill locally to other libraries of the same type. School libraries were the only significant exception; they sent 73 percent of their unfilled requests to public libraries.

Specific reference requests were much more likely to be repeated than were interlibrary loan requests, King researchers found, because reference requests often did not include enough information the first time they were placed to enable a library to fill them. Forty percent of initial requests were referred to other libraries, 47 percent to public library system clearinghouses. The Reference and Loan Library was sent about 9 percent of the requests directly. Reference and Loan also received about 15 percent of the public library system clearinghouse requests by referral.

Response Times

Library staff responding to the 1988 King survey considered overall fill rates and response times for reference requests very satisfactory. More reference requests (55 percent) specified required time frames than did interlibrary loan requests. Furthermore, response times for reference requests were faster—an estimated average of 6.6 days as compared to 10.1 days for interlibrary loan. Satisfaction with response times for reference requests also was much higher than for interloan requests. Reference requests from public libraries tended to take appreciably longer to fill than those from other libraries, but public libraries tended to require specific time frames less frequently than did other types of libraries.

Processing times for reference requests increased as requests progressed from local libraries to public library systems to the Reference and Loan Library. Counting response times of up to one day as one day, King found that on average local libraries took 1.6 days to process requests, public library systems 2.9 days, and the Reference and Loan Library 3.1 days. As with interlibrary loan requests, it was believed that more difficult reference requests were sent to public library system clearinghouses and then, if not filled, to the Reference and Loan Library.

Satisfaction and Costs

For the King study, library staff who referred requests to other libraries were asked to rate the performance of the reference services at those libraries. Generally, library re-

questors indicated high satisfaction with the timeliness, quality, and quantities of responses. In fact, average ratings were similar to national norms observed by King Research.

The 1988 King study also found that the cost-effectiveness and value of reference services were considerable. The cost per filled reference request was determined to be $14.74 for point-to-point transactions, $13.40 for requests sent to public library system clearinghouses, and $11.16 for those referred to the Reference and Loan Library from public library system clearinghouses. With reductions in average cost, however, came somewhat slower response times. As the response times quoted on page one indicate, point-to-point referrals tended to be filled more quickly than did referrals to the other two levels, and requests referred to public library systems were processed more rapidly than were referrals to the Reference and Loan Library.

Persistent Questions

By 1993, several other states were mounting major initiatives to train staff and upgrade collections in libraries in order to improve reference services. Because the King study findings about statewide reference services, which were largely positive, did not provide clear indications that these types of efforts were needed in Wisconsin, a number of questions remained about how reference services were being delivered around the state.

For this reason, the Division for Library Services decided to conduct a focus group study to determine if there were areas about which more information was needed and whether or not any further initiatives ought to be undertaken. Division staff gave these reasons for setting up the focus group study.

- To determine the current barriers public library staff experience in responding to patron requests for information in local public libraries.
- To determine the problems that public library staff have in referring reference requests to their system resource library and other libraries.
- To assess the needs for improvement of reference services at the local, system, and state levels.
- To assess the need for training of local, system, and state-level staff.

Focus Group Participants

To identify sources of participants for the study, Division for Library Services staff consulted Deborah Johnson and Charles Bunge, University of Wisconsin (UW)-Madison School of Library and Information Studies faculty members with whom they also worked to develop focus group methodology. In addition, division staff placed a notice requesting participants in the division's newsletter, *Channel DLS*, which produced responses from a few people volunteering to take part in a focus group. They also received suggestions for participants from public library system staff and Reference and Loan Library staff.

The group that eventually participated in the division's study of reference services was drawn from libraries of every type around the state. All participants were asked to fill out a brief questionnaire at the focus group session they attended in order to provide the division with information about themselves and their library operations. While not every questionnaire was returned, those completed yielded these profiles of participants and their experiences with providing reference services.

Small Public Libraries. A total of 19 people from small public libraries took part in the focus group study. Sixteen of them completed profile questionnaires.

- All participants said their present position was that of library director. Participants had worked in their present jobs from two to 23 years; the average was 8.5 years.
- All but one person provided reference service directly to library patrons. Staff from small libraries reported spending up to five hours per day providing reference services; the

average was 1.4 hours. They worked on an average of ten requests per day, with the range being from three to 35 requests per day. Most had no policy setting a time limit for working on requests and estimated that they spent from five to 20 minutes per request.

- The questionnaire asked if participants searched electronic databases to answer reference questions. Nine people from small libraries said they did not have access to any databases. Six indicated that they searched WISCAT, the statewide computerized union catalog, although all but two of the 19 libraries represented did have WISCAT. Three others had periodical indexes or encyclopedias on compact disc with read-only memory (CD-ROM), and two had access to an online circulation system through their public library system.
- Participants were asked if they had taken part in a planning process designed to define the roles their library plays in the community and, if so, to define those roles. Staff from 12 libraries had participated in a planning process. The most frequently mentioned roles were popular materials center (10), children's or preschooler's door to learning (10), reference or informational center (5), and independent learning center or lifelong learning center (3).

Medium-Sized Public Libraries. Eight people from medium-sized libraries participated in the study, and all returned their profile questionnaires.

- Four people listed their title as adult or young adult services librarian, three were reference or information services librarians, and one person was a library director.
- Members of this group had worked from one to 21 years; the average was eight years. They spent from one to seven hours per day on reference services, with an average of 3.8 hours per day. They estimated that they worked on from eight to 30 requests per day, with an average of 17 requests per day.
- Only one library had a policy about how long staff should work on reference requests, and for this library the limit was approximately five minutes. Other participants indicated that they generally spent from five to 15 minutes on each request.
- Staff from two libraries reported having no access to electronic databases. Five participants searched electronic periodical indexes, reference works such as *Masterplots*, *Magazine Article Summaries*, and *Facts on File*. One library had access to an online circulation system, and one library used DIALOG but indicated use was limited due to budget restrictions. Two libraries searched WISCAT, although all but one of them actually had it available.

Public Library System Resource Libraries. Ten people from libraries of this type were study participants, and all completed a questionnaire.

- All representatives from system resource libraries listed their title as either adult or young adult services librarian or reference or information services librarian.
- Participants had worked from three to 21 years; the average was seven years. They spent from three to ten hours per day on reference services, with an average of four to six hours per day. They estimated that they worked on from eight to 80 requests per day, with an average of 38 requests per day.
- Only one member of this group said that the library had a policy for time worked on reference requests, and that policy specified a maximum of 30 minutes. Others indicated that they generally spent from five to ten minutes on each request.
- One participant reported having no access to electronic databases. Four others searched electronic periodical indexes and reference works such as *Health Reference Center*, *State Statutes*, and Granger's index. Three used DIALOG. Other libraries reported consulting WILSEARCH and OCLC and having access to the international Internet network. Two libraries searched WISCAT, although all actually had WISCAT, and none mentioned online circulation systems, although most had such systems installed in their libraries.
- Six participants indicated that their libraries had not taken part in a planning process which defined the library's role, but they listed on the questionnaire roles they felt their libraries played. The roles mentioned were popular materials center (7), children's or preschool door to learning (5), information center (6), reference and reader's advisory center (6), independent learning center (1), and community activity center (1).

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Public Library System Staff. Eight public library system staff members participated in the study of reference services, and all returned their questionnaires.

- Seven people listed their title as either interlibrary loan or reference librarian. One person's title was circulation-interloan coordinator.
- Participants from this group had worked from one to 15 years; the average was 6.8 years. They spent from a "couple of minutes" to five hours per day on reference services, with an average of 2.5 hours per day. Respondents estimated that they worked on from two to 35 requests per day, with an average of ten requests per day.
- Participants indicated that they generally spent about 20 minutes on each request.
- Four public library system staff members reported having access to DIALOG. Others used electronic resources such as OCLC, *Proquest*, *InfoTrac*, *Baker and Taylor Link*, *Government Printing Office (GPO) Index*, and other databases. One library searched WISCAT, although all actually had WISCAT. None mentioned online circulation systems, although most had such systems installed in their resource libraries.
- Seven participants from this group reported that their systems contracted with a resource library to provide reference services for system member libraries. One indicated that there was not a contract, and another noted that service was too slow and most requests were sent to the Reference and Loan Library.
- The questionnaire asked if system employees worked on reference requests, and six members of this group responded affirmatively. One participant noted that reference work was only performed by the resource library staff.

State-Level Library Staff. Ten people providing reference services at the state level took part in the division's study, and seven returned their profile questionnaires.

- All listed their title as either interlibrary loan or reference librarian.
- Members of this group had worked from one to 18 years; the average was six years. They spent from 1.5 to eight hours per day on reference services, with an average of 4.8 hours per day. They estimated that they worked on from two to 45 requests per day, with an average of 13 requests per day.
- Three participants reported that their policy was to work on reference requests for a maximum of 1.5 hours per request, and one limited work to 20 to 30 minutes per request. Other participants said that they generally spent about 15 to 30 minutes on each request.
- Three group members had access to DIALOG. Others reported using OCLC, Bibliographic Retrieval Service (BRS) databases, *DATATIMES*, *WESTLAW*, *LEXIS*, *Dow Jones*, *Medline*, and *WILSONLINE* to answer reference questions. Several participants searched Network Library System (NLS), UW-Madison's online catalog, and WISCAT.

Academic, School, and Special Libraries. Ten people from these three types of libraries participated in the study. Five completed questionnaires.

- A variety of titles was listed on the questionnaires, including corporate librarian, medical librarian, librarian, and director.
- Participants from academic, school and special libraries reported having worked from seven to 23 years; the average was 15 years. They spent from ten minutes to six hours per day on reference services, with an average of 2.5 hours per day. They estimated that they worked on from two to 35 requests per day, with an average of 14 requests per day.
- Group members said that they generally spent about five to 45 minutes on each request.
- Two participants had access to DIALOG. Others indicated that they used electronic resources such as OCLC, BRS, *Medline*, *Groundwater Online*, *America Online*, and *WILSONLINE* to answer reference questions. Several participants searched WISCAT, one mentioned starting to use the Internet, and one had a CD-ROM encyclopedia.
- When asked if their library participated in multitype library activities, four participants responded "yes."

Profile Summary

This table provides an overview of some of the information gained from the brief questionnaires about study participants and the reference service provided in their libraries. Figures shown in each category represent the averages of all numbers reported.

Type of library	Years in job	Hours per day worked on reference	Estimated no. of requests per day
Public: small	9	1.4	10
Public: medium-sized	8	3.8	17
Public: resource library	7	4.6	38
Public library system	7	2.5	10
State level	6	4.8	13
Academic, school, special	15	2.5	14

Focus Group Methodology

The Division for Library Services held seven focus group sessions to study reference services provided around the state. Each session involved study participants who came from a particular type and size of library. For example, two separate sessions were held for staff from small public libraries in communities with 4,000 or fewer residents. One was held for study participants from medium-sized public libraries, those that, while not public library system resource libraries, still were serving populations of more than 4,000.

A fourth focus group involved public library system resource library staff and a fifth, public library system staff who worked with reference requests or worked with referral of reference requests. One session involved the study participants who worked in state-level resource libraries, including the Reference and Loan Library, the State Historical Society Library, UW-Madison special libraries, and state government libraries. As the participant list indicates, a session also was held for staff from school, special, and academic libraries, even though the primary focus of the study was on public library reference services.

Group Process

Charles Bunge facilitated the focus group sessions for state-level staff and public library system personnel. Sally Drew facilitated sessions for staff from small and medium-sized libraries; system resource libraries; and school, special, and academic libraries.

Jerral Parrish, a doctoral student in library science at the UW-Madison, assisted by taking notes and compiling information gained from the focus group sessions. Mary Struckmeyer, supervisor of the Interlibrary Loan and Reference Services Section at the state Reference and Loan Library, also attended each session and took notes.

Each facilitator opened focus group sessions by introducing him- or herself and explaining the group's purpose. This was, the facilitator noted, to discuss and gather information about reference services provided in Wisconsin libraries. Reference requests, therefore, would fall within the scope of the discussion, while interlibrary loan requests would not.

For further clarification, the facilitators provided definitions of the two types of services. Reference service, they said, was the process of providing information or materials in response to a request for information about a specific subject or field of inquiry. Interlibrary

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loan, on the other hand, was defined as the process of locating and borrowing a specific title for which sufficient bibliographic information already was known

During the opening segment of each focus group session, facilitators also invited participants to introduce themselves. They were requested to include in their introductions information about how long they had worked in reference services and whether or not they had originally planned to work with reference services.

Questions Asked

Once introductions were completed, group members were asked to respond to prepared questions, answering them in relation to provision of reference, rather than interlibrary loan, services. The questions posed to different groups of participants had been developed by Division for Library Services staff in consultation with UW-Madison School of Library and Information Studies faculty members Charles Bunge and Deborah Johnson.

Library staff. The study participants from small and medium-sized libraries, public library system resource libraries, and multitype—special, school, academic—libraries were given these questions to discuss.

- Describe the kind of reference requests that your library staff typically answers successfully onsite.
- Describe the kind of reference requests that your library staff typically does not answer successfully onsite and needs to refer.
- What gets in the way of providing answers to reference requests asked by users of your library?
- It may not always be possible to meet all of your patrons' needs with resources in your library. Do you find it necessary to refer requests to another source? If so, what has been your experience when referring requests?
- Thinking about what you have said today, are there any types of training which would be useful to you or staff in your library in providing reference service?

System staff. Reference personnel from Wisconsin public library systems who participated in the study were asked to respond to the following questions.

- What has been your experience in answering reference requests received from public libraries in your system?
- What has been your experience in answering reference requests received from other types of libraries in your area?
- It may not always be possible to provide an answer to a reference request. Do you refer requests to another source? If so, what has been your experience in referring requests to other libraries at the local or state level?
- Thinking about what you have said today, are there any types of training which would be useful to you or the staff you work with in providing reference services or referring reference requests to the libraries?

State-level staff were requested to discuss these questions about reference services.

- What has been your experience in responding to reference requests received from public library systems and the Reference and Loan Library?
- What types of resources do you usually use to respond to questions you receive from public library systems or the Reference and Loan Library?
- It may not always be possible to provide an answer to a reference request. Do you refer requests to another source? If so, what has been your experience in referring requests to other libraries?
- Thinking about what you have said today, are there any types of training that would be useful to you or the staff you work with in providing reference services or referring reference requests to the libraries?

Summary of Participant Responses

This section provides an overview of focus group participants' responses to the questions presented to them. While some reorganization and editing were necessary for clarity, these have been kept to a minimum in an effort to report the information gained at focus group sessions as accurately as possible.

Questions Successfully Answered

Focus group participants reported success in using their own library collections to answer reference requests for information on a wide variety of topics. In general, the size of the public library helped determine the types of reference requests its staff was able to answer successfully.

Small Public Libraries

Staff in small public libraries reported most frequent success in answering questions about telephone numbers and addresses of businesses and government officials. They used telephone books to do so, as well as the *AT&T Toll-Free 800 Directory*, directories published by their local chambers of commerce, and the *Thomas Register*.

Also mentioned one or more times as topics about which the small libraries successfully supplied information were animals, birds, and plants; local history and genealogy; automobile repair; geography and travel; autobiography; and ethnic groups and Indian tribes.

Staff from small libraries reported receiving a number of requests for medical information. Most were able to answer simple questions, but said that they also referred many medical questions. Among tools they used to answer questions in the library were the *Physicians Desk Reference, Mayo Clinic Family Health Book*, and *Mayo Clinic Health Letter.* Several staff members noted that they were cautious about answering medical questions, and others reported that patrons were asking more specialized questions than they had in the past.

Focus group participants reported being able to handle successfully questions that could be responded to using information from dictionaries, encyclopedias, and almanacs. They also frequently consulted periodical indexes such as the *Reader's Guide to Periodical Literature.*

Small-library staff generally said they were comfortable working with library patrons. They did not have difficulty getting information from patrons when assisting them.

Medium-Sized Public Libraries

Staff from medium-sized libraries reported receiving a wide variety of reference questions and noted many areas they were able to handle successfully. They also were quick to point out problems in answering questions, and they expressed less overall confidence in their ability to respond to patrons' requests in the depth which they perceived was needed.

Personnel from medium-sized libraries said they worked closely with local schools to coordinate provision of information for students working on school reports and projects. They also worked with teachers and day-care providers.

Many questions on business-related topics were answered successfully in medium-sized libraries, according to focus group participants. Among areas covered were job search and career information, specific information about jobs in other cities, telephone numbers of businesses, small-business franchises, business management, customer service, training, and salary comparisons.

Medium-sized libraries also reported success in answering local history and genealogy questions. One library used local experts to answer genealogy questions. On the other

hand, staff mentioned receiving specialized medical questions and having problems maintaining adequate collections and knowing how much and what kinds of information to provide. This group reported referring medical questions.

Resource Libraries

This focus group was made up of staff who worked the reference desk in libraries designated as public library system resource libraries. They answered questions that came directly from members of their own community and from patrons of other libraries in the system. In some cases, they might also respond to questions referred through interlibrary loan channels from libraries in the system area.

In most cases, resource library staff did not seem to differentiate between questions from local library patrons and system patrons. Most reported answering a high percentage of questions locally. They also noted that questions were becoming increasingly specialized and complex.

Staff in resource libraries reported filling many requests for telephone numbers, zip codes, and addresses. They used census data and government documents to fill patrons' requests for statistical information. Among business-related questions they answered were those about technology and standards. They frequently provided patrons with community information and assisted students with school assignments. Staff also reported receiving legal questions, but indicated that a resource library has difficulty responding to them.

Other types of requests that staff at resource libraries said they answered successfully were those for consumer information, do-it-yourself information, and automobile and appliance repair guidelines. They also successfully supplied many requestors with music, movies, gardening and cooking information, and general information about antiques.

School, Academic, and Special Libraries

Special and academic library staff mentioned that they successfully answered questions relating to subject areas in which their libraries had specialized collections. They also reported frequently and successfully using online and CD-ROM databases to answer questions. Several special librarians said that they rarely used their library's materials collection and usually searched databases first.

Members of school library staffs indicated that they could answer about 90 percent of curriculum-related questions.

Questions Difficult to Answer

The types of reference questions that were hard to answer proved to be similar for public libraries of all sizes. Focus group participants noted that filling requests for information on these subjects was often challenging for a number of reasons.

Medicine, Law, and Music

Mentioned most frequently as causing problems for reference staff were requests for medical and legal information. Several people said that the library seemed to represent a "safe" place for patrons to get information on these topics.

For both subject areas, however, focus group participants expressed concerns. Among these were providing accurate information, not knowing how much information to provide, not wanting to interpret information or provide advice, and dealing with questions about terminal or life-threatening diseases or complex legal problems.

Other types of requests mentioned as often being hard to fill were those for information on the sources of quotations, song lyrics, and lines from poetry. Sheet music and songs were

frequently difficult for libraries to locate. Library staff also said they had trouble providing detailed information on antiques and collectibles.

Science and Standards

Questions on science, technology, and math caused librarians problems. Staff in small libraries mentioned difficulties with locating information on some animals, especially those specific to certain regions of the country or world. Staff from libraries of all sizes also noted that it was hard to acquire information on patents and standards.

Resource librarians mentioned difficulty in answering questions about international businesses and international standards. They said that patrons wanted information on companies to use during employment interviews, and that there was little information on many smaller or privately held businesses. Resource librarians also mentioned the difficulty of getting statistical information, especially local statistics.

Genealogy

Although library staff in small and medium-sized libraries also mentioned difficulty in dealing with genealogy questions, this was especially emphasized by the resource librarians. They said that people did not understand how long it took to do genealogical research and had unrealistic expectations of what could be found in their local library. Resource librarians said that they did not like to spend a lot of time working on requests from out of state or received via correspondence.

Special librarians reported difficulty in getting information from government documents. They also said that specialized newsletters were difficult to find.

Other Difficulty Factors

There were other reasons besides those relating primarily to subject area that made it difficult for library staff to successfully answer reference questions and meet their patrons' information needs. The following were mentioned by participants from several groups.

Patron Expectations

Library staff at all levels said that patrons often had no idea how much time it might take for someone to answer their questions. Some felt that patron expectations were unrealistic, while others thought that they should attempt to do whatever was needed to get the information their patrons wanted.

Focus group participants noted that patrons were frequently frustrated that information could not always be found in a single source. Library users also had high expectations, which could not always be met, of what could be done through automation. In addition, patrons often wanted advice as well as information, and library personnel were not able or willing to provide advice, especially on medical or legal questions.

Some library staff reported that patrons were sometimes unwilling to go to other places or use other libraries. Others noted that patrons did not realize how much it cost to answer questions or use computer systems, or that the library could not always afford to do the research they requested.

Adult Student Questions

Staff from all types and sizes of libraries expressed frustration with trying to serve adult students seeking information for papers, theses, or dissertations. Such patrons were frequently working on advanced degrees and often were not full-time students. They appar-

ently spent little time on campus and did not appear to frequently use the library at the university or college where they were taking courses.

This issue first surfaced in the two focus groups attended by staff from small libraries and arose again in other groups. Staff said that nontraditional students liked to use the local library, and that their patrons were frequently willing to wait for information. They reported using interlibrary loan to obtain for these students materials that were not available in the library.

Staff reported that people expected the local library to have or be able to obtain the same resources available at a college or university. Several people said that students seemed to think that all libraries were the same. Students were disappointed to find out that medium-sized and small libraries might not have access to the kinds of automated services they had seen in their college or university libraries.

Library personnel said that education students frequently used the public library to obtain children's materials, and that this sometimes created a shortage of materials for serving children. These same staff members also reported having a generally good relationship with the local college library. However, another person noted that academic libraries did not always acknowledge services that public libraries provided to their students.

That same point surfaced in the focus group made up of special, academic, and school library staff. A hospital librarian reported that "everybody on God's green earth is going back for a master's degree, so we are expected to be a college library also." School library media center staff reported that teachers were frequently doing advanced course work and also expected the library to assist in doing their research or obtaining materials. University library staff reported serving patrons from other universities or those taking correspondence courses.

One librarian said that there was a positive side to this type of library use. The library's patrons are comfortable using the library and are looking for information. She said "we say our job is information, but really it is education. We are eventually going to educate people where they should be going and what types of information they should be looking for."

Need for Timeliness

Library staff said that patrons often needed information immediately, and did not plan far enough ahead so that the library had time to refer their requests. This was especially true of students. Staff in small libraries said they often warned patrons that it might take at least two weeks to get an answer to a reference question. Most reported that reference requests were processed more slowly than were interlibrary loan requests. Others reported that when patrons really wanted information, they were willing to wait.

Public library system staff expressed concern about the time it took at that level to answer requests. One person indicated that the system was at the breaking point in answering requests. Another said that no one wanted to work on reference requests, so they did not always get done. Others tried to work on them the same day if possible and had a target of filling them within 24 hours. Most attempted to respond by deadline dates on requests. Some system staff used the delivery schedule as a guide to working on requests.

Staffing Levels

A number of focus group participants from small libraries reported that the library was staffed by one person, who had to perform other services as well as answering reference requests. In some small libraries any staff member was allowed to handle reference requests, while in others only one staff member was assigned this task. Staff in small libraries reported problems with using volunteers, who they felt often attempted to answer reference requests and did not always do an adequate job of interviewing the patron.

Medium-sized libraries were more likely to have staff assigned to reference work, but some did not have separate reference desks. While in some medium-sized libraries any

staff member could help a patron with a reference request, only one or two staff members were allowed to decide when to refer a request.

Large libraries reported problems with having sufficient staffing for peak periods and on weekends. Staff in large libraries also reported having difficulty responding to phone calls and not being able to spend enough time with patrons because more people were waiting.

Reference Interviews

Staff in small and medium-sized public libraries expressed some concern about their ability to get enough information during the reference interview. One person said that there could be a reluctance to pry too much in a small town. Others said that many times people told them more than they wanted to know.

Some reported reluctance to go back to a patron to ask for more information. One person said that sometimes there was a personality conflict between the patron and the librarian, which made it difficult to get additional information.

Several staff members said that they had received training in reference interview techniques. Some reported that patrons did not always know enough about a subject to be specific about the kind of information they needed. In some libraries, different staff members conducted the reference interview than were responsible for referring the request.

Processing Referred Requests

System and state-level library staff who participated in focus group sessions were asked to describe their experiences with processing reference requests received from other libraries. The quality and quantity of information local libraries included on requests were among topics discussed.

Completeness of Information

Public library system personnel said they received requests from other libraries both by mail and on the telephone. They noted that the level and specificity of information provided on requests varied somewhat from rural to urban areas. Questions referred from libraries with good reference collections tended to be better defined.

Staff at the system and state levels reported varying levels of frustration with working on requests referred to them, depending on the amount of information provided. They found it difficult to fill some requests, because they often did not have a chance to talk to the patrons directly. They encouraged libraries to include the patron's name and phone number on each request, as they sometimes found it useful to be able to call the patron directly.

System-level staff also expressed concern that when they called the local library staff back to get more information, this sometimes caused library staff to cancel the request.

Request Forms

System staff and state-level staff both reported having problems getting sufficient and accurate information about a patron's request from local libraries. There was a perception that often local library staff had more information but did not document it all when referring the request.

In some cases when a patron's name and phone number were included on a request and system-level staff called the patron directly, they discovered that what the patron wanted was something very different from what had been described on the request submitted by the library. Staff especially emphasized the need to know the level of information required and said that this was often not included on requests submitted to them.

System and state-level staff noted that it was difficult to design a request form that required all the needed information. Several systems were in the process of designing new forms. Library staff said that the forms were helpful in guiding their discussions with patrons.

Referring Requests to Other Sources

One of the questions posed at focus group sessions was designed to elicit information about the extent to which staff at libraries of all types referred requests they could not fill to other sources. Ways they handled this process also were discussed.

Referral Processes

Various focus group participants indicated that they handled requests they could not fill themselves in different ways. Some sent patrons directly to other libraries rather than referring their requests. Others preferred to act as an intermediary and felt the patron was better served that way. Some reported that they tried to make phone calls while the patron was at the library, and others that they sometimes gave patrons the phone number of a person to call.

Librarians, especially those in medium-sized and resource libraries, reported that they often called other organizations or individuals to get information. This served as a substitute for referral of requests to other libraries. Library staff from all types and sizes of libraries reported using the *Encyclopedia of Associations* to find potential sources of information.

While some library staff said they felt guilty about sending requests to other libraries, most thought of this as a part of their regular service. Some reported referring everything that could not be filled locally. One librarian said "I used to think I needed to own everything, but now I think I just need to know where to look for it." Another said that "if you know a question is going to be pursued until it is answered, you tend to do more within your own library."

Library staff reported problems resulting from having to go through so many referral layers. In some cases, they perceived that information was lost or deleted as requests were referred to the next level.

Librarians working in special libraries expressed the most frustration at not being able to call other libraries directly with requests for information or interlibrary loan requests. Several reported calling their resource library directly rather than going through the public library system.

Satisfaction with Service

Participants also were asked to assess their satisfaction with the service they received from referral agencies. Among referral sources discussed were other libraries, public library systems, and the state Reference and Loan Library.

Other Libraries. Some focus group participants said that they referred requests to the county level, which then referred them to the public library system. These staff felt that the number of levels to which reference requests were referred slowed the request too much and also noted that sometimes materials referred from the county level were old. One participant expressed concern about the staffing levels at libraries to which requests were referred.

Public Library Systems. Participants were generally positive about public library system services. One said that reference workshops were the best system service. Several

reported that their system had an 800 number on which they could call in requests, and that this was a good service.

A number of staff members from medium-sized libraries reported referring requests to the system level more frequently than they had in the past.

Reference and Loan Library. Systems reported sending most unanswered requests to the Reference and Loan Library. Some system staff said they thought that people underestimated what Reference and Loan Library staff could do.

Librarians felt that the Reference and Loan staff did a good job and that communication was very good. They reported that the more difficult requests were sent to the Reference and Loan Library. They said that requests went through channels even though librarians could sometimes predict that they would end up at Reference and Loan.

Focus group participants said that the guide sheets provided by the Reference and Loan Library helped local library staff conduct better reference interviews. Several people reported being surprised at the variety and depth of questions that Reference and Loan Library staff could answer.

One system resource library reported sending any questions to the Reference and Loan Library that could not be answered within 24 hours. Another reported rarely sending requests to the state level.

Impact of Technologies

Those who took part in focus group sessions discussed the ways that having access, or lacking access, to various technologies affected the reference services they were able to provide. They also noted the different ways awareness of technology affected patrons' expectations of library services.

Automation

Focus group participants observed that younger patrons, especially, had been exposed to use of computers and technology and had high expectations of what could be done. They expected more libraries to have online catalogs. One participant said it was embarrassing for public libraries not to be automated when even smaller schools were. There was a disparity in technology levels among libraries.

Library staff noted that some of their patrons wanted more full-text information online. Some reported that patrons didn't always find bibliographies valuable; they wanted the full information.

Staff at all levels complained that while technology was valuable, it often made their jobs more difficult and complicated. They said that there was no time for them to become adequately trained to use the new tools, and that they did not have time to train patrons to use automated systems either. Some also noted that rapid changes in technology were difficult for some patrons to handle. Older patrons sometimes missed using the card catalog when it was no longer available.

Resource library staff said that often online computer searches were performed by the same staff who worked on the reference desk. Staff complained that they were having trouble being linked to the Internet.

Telefacsimile (fax) Machines

Library staff reported that businesses and some patrons increasingly expect to be able to obtain material via fax transmission. Several libraries reported having policies on use of fax.

Concern was expressed that there is a staff time burden to fax requests. Staff are not certain what priority to give requests for information received via fax.

Tools and Resources

Some tools and materials that support the work of those filling requests for information, and their various uses, also were discussed at focus group sessions. Participants included comments about patrons' reactions to some resources.

Database Searching

Staff from small libraries said that patrons generally liked the results of database searches done for them at the system or state level. One person from a medium-sized library, however, said that users did not seem to be interested in requesting database searches.

Resource library and system staff also reported on their experiences with database searching. One library had an online search librarian responsible for performing database searches. Other reports were less positive, however, noting a policy that discouraged database searching, staff who said they didn't have enough experience to be good at database searching, informal cost limitations, and a failure to publicize the availability of such services.

Special and academic libraries reported conducting online or CD-ROM database searches regularly. They often did so before turning to their printed materials.

WISCAT Use

Staff reported that WISCAT, the statewide union catalog on CD-ROM, had made a big difference, because it enabled patrons to see what was available at other libraries. Some said that WISCAT allowed small libraries to be a conduit for information. Staff in many small libraries reported letting their patrons use WISCAT. They said that key word searching was useful for locating titles and subjects.

Library staff reported frequently changing subject requests into author/title requests submitted through the interlibrary loan process. Many appeared to do this simply because the capability was there, while others reported doing so to save time. Some questioned this practice, stating that more current information might be available from the systems or the Reference and Loan Library if the subject requests were sent there instead.

Materials Collections

Library staff said that the lack of availability of materials in their collections sometimes served as a barrier to answering reference questions. However, this was not given more emphasis than other potential barriers, such as staffing levels.

System staff felt that system libraries should be able to make suggestions for purchases at the resource library. In some cases, the system bought materials for the resource library in order to fill gaps in the collection. Library staff reported buying materials needed to help students carry out school assignments and on subjects about which they received frequent requests for information.

Personnel from smaller libraries said they relied on being able to obtain older editions of reference materials from other libraries when these libraries bought new editions. Staff from small libraries also said it would be helpful to get a list of key inexpensive reference materials and to be trained in their use.

Patron Satisfaction

Staff in public libraries of all sizes reported that patrons were generally satisfied with the information provided in response to reference requests. They indicated that their patrons appreciated the opportunity to have requests referred to systems and the state level

and were impressed with the information they received. In some cases the information provided resulted in the patron asking additional, more specific questions. A few librarians, however, noted that their patrons were sometimes disappointed, and that the time frame for responding to reference questions was sometimes too long.

Reference staff from medium-sized and large public libraries said they did not always know if people were satisfied with information received from the system or state level. This was because the information to fill requests was provided to patrons by the circulation staff, and reference staff neither saw the results nor talked to the patrons.

System staff and Reference and Loan Library staff had made attempts to evaluate service, but said that results were spotty because patrons did not always return evaluation forms. Staff from these organizations also reported people writing to express their gratitude on occasion. Generally, however, system and state-level personnel felt a strong need for more feedback on how effective their services were.

Training and Improvement

Public library system staff thought it would be useful to sponsor more staff exchanges that would give personnel from system member libraries opportunities to work in the system office or system resource library. They also said it would be helpful to have a directory of the policies of state-level resource libraries that could be given to public libraries.

System resource library staff emphasized the need to have opportunities to share ideas. Staff generally emphasized the need to know more about the types of reference materials available, so they could choose those that would meet their needs.

Training. Various focus group participants mentioned a need for training in the following areas.

- Reference interview techniques
- New technologies, library automation
- Use of online databases
- Use of the Internet
- The types of resources available
- Setting of guidelines for providing reference service

Improvement. Participants offered other specific suggestions for improving reference services as well. These related to

- the need to establish procedures and guidelines for using fax machines,
- improvement of the statewide delivery system,
- development of a procedural manual for the Reference and Loan Library,
- development of a directory of the services provided by state agency libraries,
- compilation and release of information about what statistics libraries keep on reference services,
- inclusion of the Wisconsin Union List of Serials (WULS) in WISCAT on CD-ROM,
- compilation of an annotated list of CD-ROM resources available in libraries, and
- compilation of a list of the libraries that are indexing Wisconsin publications and of the publications being indexed.

Observations and Recommendations

Division for Library Services staff and others who assessed focus group study results found it challenging at times to determine whether participant comments always referred to reference services. The reason for this seemed to be that participants occasionally had trouble making the distinction between reference and interlibrary loan services as they responded to questions posed.

This difficulty occurred even though group facilitators had made an attempt to clearly delineate the scope of the focus group study at the beginning of each session and also had provided definitions to help participants distinguish between reference and interlibrary loan requests. A number of participant comments that obviously related to interlibrary loan had to be eliminated as this report was compiled

Reviewing Findings

Nonetheless, focus group participants raised a number of significant issues that affected their ability to provide effective reference services. After reviewing participant comments, Division for Library Services staff were able to make some observations about issues discussed at focus group sessions. They also suggested possible directions for future study, for inservice training, and for provision of reference services at the state level.

Serving Adult Students

Although public libraries have probably been assisting adult students for many years, focus group participants' comments appeared to indicate that this role was a growing one for public and other types of libraries and that it caused some frustration for library personnel. While reference staff from around the state wanted to be able to help all users and seemed generally service-oriented, they were clearly frustrated about their ability to meet the needs of adult students. They also did not fully understand why such students did not use university libraries more frequently.

In addition, some public libraries and public library systems were experiencing difficulties in their relationships with academic libraries in their areas, as academic libraries became increasingly unwilling to handle the amount of interlibrary loan traffic being generated. Over the last year, staff at several academic libraries have expressed to the Division for Library Services a concern about increases in interlibrary loan requests, noting the lack of funds available to enable them to provide this service.

It is quite possible that there is a relationship between the experiences of public library staff in providing reference service to adult students and the perceived increase in interlibrary loan requests being referred to academic libraries. However, neither the Division for Library Services nor public library systems have much data about this perceived problem. Further research or study should be undertaken to determine its extent and to clarify the role of public libraries and the university system in serving the adult student population.

Requests Not Filled Locally

Over the years, the state Reference and Loan Library has attempted to build a collection that would fill the gaps between what public library system resource libraries could provide system patrons and what could be found in and borrowed for those patrons from university collections. Whether or not Reference and Loan could build a collection to fill such information gaps effectively has been questioned from time to time.

Given this, Division for Library Services staff found it interesting to review the types of reference requests that focus group participants said they had difficulty filling. Almost all of these dealt with subject areas for which the Reference and Loan Library had made a

special effort to develop materials collections and/or to acquire tools that would make it easier to locate the types of items often requested by Wisconsin library patrons.

For example, Reference and Loan has developed collections of legal and medical information aimed at the layperson or allied health professional, and its staff frequently search electronic databases to identify needed information in these fields. The library also has collections of song and sheet music and an in-house index that is used to identify specific musical items requested.

In addition, Reference and Loan reference staff often work on questions related to science, technology, patents, math, and statistics, all subjects that local libraries said caused them problems. The library also receives and answers many questions about antiques and collectibles.

Genealogy was the one problem-causing subject about which Reference and Loan had not made a major effort to collect materials. Its reference staff normally refers requests for genealogical information to the State Historical Society, which has an excellent collection.

Time Spent on Requests

Staff in small and medium-sized reported that they were able to devote only a limited amount of time to working on reference requests; most said they rarely spent more than 15 minutes per request. Resource library staff sometimes spent longer, but also frequently had to limit the time per request to 15 minutes because of the number of people waiting for service. Public library system staff reported working on requests for 20 minutes or less.

Except perhaps in the smallest libraries, 15 minutes of request processing time is rarely enough to enable reference staff to thoroughly search all the resources available in the library for answers to their patrons' reference questions. Neither does a 15-minute limit allow enough time to gather the materials from multiple sources that many requests require, especially when periodical literature must be located and copied. Database searching also usually takes more than a quarter of an hour, unless only a preliminary search is made using one or two subject headings.

Clearly then, most of the reference requests that can be answered with minimal effort are filled locally, and those referred to the state level are the ones likely to require more processing time. Staff at the Reference and Loan Library report working an average of one hour to an hour and a half on each request they receive. Many of the requests they fill take less time than this and a few require more.

Reference and Loan takes various steps to fill requests that local and system-level reference staff may not have enough time to undertake. Database searching is used frequently, after which materials must be retrieved from the collection and prepared for the patron. Reference and Loan staff also prepare worksheets that suggest further resources the patron could check. When they list outside sources, staff usually verify that these sources have the needed material or information available or that a potential resource person will be willing to assist the requesting patron.

For these reasons, there would appear to be a continuing role for the Reference and Loan Library as a reference center of last resort, even though Wisconsin public library systems refer only 10 percent or less of their requests to the state level. Library staff who participated in the focus group sessions reported that requests from their patrons were becoming more complex and difficult to fill. In addition, they had no reason to believe that staffing levels were likely to improve fast enough to allow them more time to spend filling requests.

Timeliness of Responses

A number of focus group participants expressed concern about the length of time needed to refer requests through established channels to the state level. While there may be no easy ways to address this concern, it deserves further study to determine if any methods can be developed for streamlining the referral process.

Information on Referred Requests and Patron Satisfaction

Those who attended focus group sessions for system and state-level reference staff expressed concern about the amount of information they were given to work with on referred requests and said they often felt that request documentation was inadequate. It was hoped that the focus group sessions might shed some light on the nature of this problem and ways to overcome it. However, this did not really occur. Local library staff did not express a great deal of concern about being unable to get adequate information from patrons, although some did mention this.

System and state-level staff also expressed frustration over not knowing whether they were providing patrons with the information they needed. Local library staff offered a partial response to this question during their focus group sessions, generally saying that patrons were satisfied with the materials received through the referral process. Patrons themselves have never been systematically surveyed, however, so no specific data on satisfaction levels are really available. The extent to which patron satisfaction is a serious problem still is not clear.

The frustration of system and state-level staff could be related to having little patron contact and obtaining little feedback. It also is possible these reference providers are, by and large, meeting patron needs, although there is evidence that some needs are not met.

The Division for Library Services recommends that further work be undertaken to determine patron satisfaction through user surveys. It might also be useful to conduct some case studies to document what actually happens to a reference request as it is referred through several levels of reference providers.

Reference Interviews

It was hoped that the focus group sessions might shed some light on the need for training in reference interview techniques among Wisconsin library staff. National library groups have been giving a great deal of attention to the need for effective reference interviews in recent years, and several states have developed extensive training programs.

While some Wisconsin focus group participants did express concern about their abilities to conduct adequate reference interviews, most appeared to feel fairly comfortable with their ability to do so. While it is possible that there is a need for this type of training, the focus group sessions did not particularly bring this out.

Impact of Technology

The discussions at focus group sessions indicated that technology has had a definite impact on reference service in Wisconsin. They also made it clear that technology is only beginning to gain full penetration in most libraries, and that staff are very challenged by attempting to keep up with various technological developments.

The problems associated with providing reference service using technology should be more fully explored. It also seems clear that more training for libraries in use of technology should be provided.

Improving Service

Division for Library Services staff agreed with a number of the suggestions that focus group participants made for improving reference services around the state.

- Establish procedures and guidelines for using fax machines.
- Develop a procedural manual for the Reference and Loan Library.

- Develop a directory of state agency library services.
- Provide information on what statistics libraries keep on reference services.
- Include the Wisconsin Union List of Serials (WULS) in WISCAT on CD-ROM.
- Compile an annotated list of CD-ROM resources available in Wisconsin libraries.
- Compile a list indicating which libraries are indexing Wisconsin publications and what publications are indexed.

Evaluating the Experience

Reference service providers who took part in this study seemed to welcome the opportunities for discussion and exchange that it provided. Both during and after focus group sessions, library staff from around the state who participated expressed appreciation for the opportunity to get together and share ideas. They thanked division staff frequently for allowing them to take part and assist in evaluating reference service.

Resource library staff in particular noted that they rarely, if ever, were given the opportunity to discuss reference service issues or to share ideas with their peers in other libraries. Division staff also noted that the focus group sessions provided them with a valuable opportunity to meet library staff who work directly with patrons and to learn about their day-to-day experiences.